

Job Aid:

How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid: Single Vendor

This Job Aid shows how to:

- Find and open an evaluated and awarded COMMBUYS Bid
- Create a Master Blanket Purchase Order (Contract) for an awarded Bid in COMMBUYS

Of Special Note:

Once the solicitation process is complete and the bid is awarded to a vendor(s) a MBPO for a new contract needs to be created in COMMBUYS. This job aid starts at the point where the bid has been awarded and approved. **This Job Aid is only for a one vendor per MBPO, if you have a contract with multiple vendors and require quotes for each execution of the contract then you need to follow the Create a Multi-Vendor MBPO Job Aid.**

Screenshot



Directions

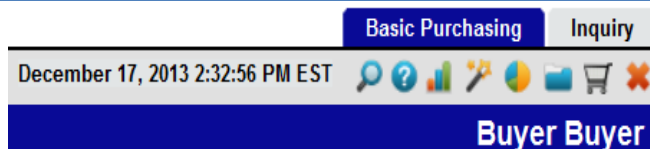
1. Launch the COMMBUYS URL.
Type <https://www.commbuys.com/bsol> in the Browser.

Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.

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Screenshot



Directions

2. If you have multiple roles in COMMBUYS select the Basic Purchasing role on the upper right side of the home page. If users have only one role, no user role tabs display.

3. Go to your **Control Center** to locate the awarded bid. The bid must have you listed as the purchaser or you need the appropriate COMMBUYS privileges.

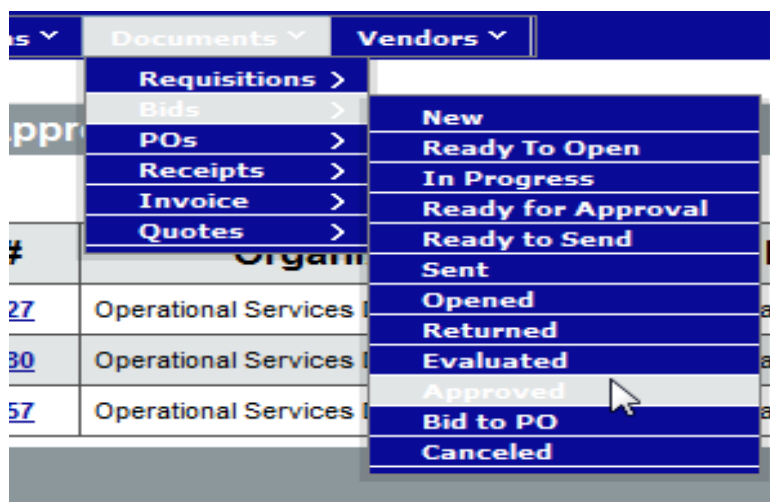
Click **Bids > Approved** and a list of available bids will display.

Note: In this example, there are three bids in the Control Center. Two bids are ready for conversion to a **Blanket** purchase order.

News(1)	Dashboard	Reqs(7)	Bids(22)	PO(0)	Approval(1)	My Reminders(4)	Events(0)
In Progress(2)	Ready for Approval(0)	Ready to Send(0)	Ready to Open(14)	Opened(3)	Approved(3)		

Bid #	Organization	Buyer	Description	Purchase Method
00000127	Operational Services Division	Linda Banks-Grant	test approval	Open Market
00000080	Operational Services Division	Linda Banks-Grant	restock items	Blanket
00000057	Operational Services Division	Linda Banks-Grant	Dog Food for Shelter	Blanket

4. Another way to locate a bid not assigned to you and is ready for purchasing, select **Documents > Bids > Approved** from the Navigation bar.



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Screenshot

Bids - Approved

Bid(3)

Bid #	Organization	Buyer	Description
00000127	Operational Services Division	Linda Banks-Grant	test approval
00000080	Operational Services Division	Linda Banks-Grant	restock items
00000057	Operational Services Division	Linda Banks-Grant	Dog Food for Shelter

Bids - Approved

Bid(6)

Bid #	Organization	Buyer	Description	Purchase Method
00000127	Operational Services Division	Linda Banks-Grant	test approval	Open Market
00000099	Operational Services Division	Administrator System	DOT-ENTTIME-FY13-001 Enterprise Time and Attendance Solution Planning	Open Market
00000082	Operational Services Division	Administrator System	solicitation from solicitation enabled blanket test	Open Market
00000081	Operational Services Division	Administrator System	Medical Marijuana Program Coordination	Blanket
00000080	Operational Services Division	Linda Banks-Grant	restock items	Blanket
00000057	Operational Services Division	Linda Banks-Grant	Dog Food for Shelter	Blanket
00000025	Operational Services Division	Eileen Honen	Pet sitting services	Blanket
00000007	Operational Services Division	Administrator System	Abrasives	Open Market

Bid Tabulation for Bid #BD-14-1080-1080C-1080L-00000000212

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

Total Number of Submitted Quotes: 9

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
QT-1080-C1201-C1210-00000000066	Bid for Vendor 2	00002137	TOM/Vendors	06/10/2014 03:28:01 PM	View Quote
QT-1080-C1201-C1210-00000000065	Bid for Vendor	00000267	Barter Steel LLC / Harris Refar	07/03/2014 09:42:00 AM	View Quote
QT-1080-C1201-C1210-00000000070	Bid for Vendor	000125	B & B Engineering	06/10/2014 08:52:00 AM	View Quote
QT-1080-C1201-C1210-00000000072	Bid for Vendor	235372	Bank of America	06/10/2014 10:00:00 AM	View Quote
QT-1080-C1201-C1210-00000000074	Bid for Vendor	264594	Bacher Corporation	06/09/2014 10:06:00 AM	View Quote
QT-1080-C1201-C1210-00000000075	Bid for Vendor	00001174	K and M Communications	06/09/2014 10:10:00 AM	View Quote
QT-1080-C1201-C1210-00000000076	Bid for Vendor	00000175	E Altes Cleaning Service	06/09/2014 10:23:00 AM	View Quote
QT-1080-C1201-C1210-00000000077	Bid for Vendor	00000999	J & E Mechanical Corp	06/09/2014 10:28:00 AM	View Quote
QT-1080-C1201-C1210-00000000079	Bid for Vendor	222929	Jack Young Company, Inc	06/02/2014 11:57:00 AM	View Quote

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Directions

5. Bids assigned to your user id display first.

Click **View All** to view the complete list to select a bid not assigned to your user id.

Click on the **Bid #** blue hyperlink to open an approved Bid.

Note: Open Market bids can be changed to Master Blankets; however they are typically used for a one time bid that will most likely not result in a contract.

6. The Bid opens to the **Summary** tab.

Scroll to the bottom of the page and click the **Bid Tab** button.

7. The **Bid Tabulation** page displays all the Quotes received for the selected bid.

Click the **Summary** tab.

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Screenshot

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score **Summary** Back to Bid

Bid Tabulation Information

Total Item Count: 3 Total Awarded Quote Count: 1 Bid Status: 254 - Bid Approved (Ready for Vendor Awarding)

Canceled	Item Info/Quote Info	
	Per session 1r - Note Price is set by Commonwealth of MA \$55.00 Estimated service level for xyz regional area Item #1 Print Sequence 1.0 Status 254 - Approved Quantity 5000.0 Vendor	<input type="checkbox"/> \$54.40 Discount: 0% Late
	Per session 1r - Note Price is set by Commonwealth of MA \$55.00 Item #2 Print Sequence 2.0 Status 254 - Approved Quantity 5000.0 Vendor	<input type="checkbox"/> \$52.00 *** Discount: 0% Late
Yes	1r services Item #3 Print Sequence 3.0 Status 25C - Canceled Quantity 100.0 Vendor	<input type="checkbox"/> \$0.00 Discount: 0% Late
	Total: \$ Vendor Gross Total \$ Vendor Discount \$ Vendor Net Total \$ Preference Discount \$ Evaluation Total \$ Vendor Freight \$ Awarded	\$532,000.00 \$0.00 \$532,000.00 \$0.00 \$532,000.00 \$0.00 \$532,000.00
	Eval Codes	
	Per Codes	

Evaluation Code Descriptions:
** = Low Item Price

Create PO Print

Directions

8. The **Summary** tab for the bid opens. Scroll to the bottom of the page and click **Create PO**.

Note: The Create PO button will only appear if the Bid has been awarded.

9. The Purchase Order Creation Preview page displays with the purchase order creation options, which are already preselected:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors
- Include Vendor Quote Attachments
- Include Forms

Keeping all checked will carry over from the Bid to the Master Blanket.

Click **Continue** to create the MBPO.

10. The page refreshes with the purchase orders created from the bid, one for each Vendor awarded.

You can open either PO by click the **PO #** or you can click **OK** to return to the MBPOs at a later date.

If you click the PO #, skip to step 13.

Note: Purchase Order #s are generated, different from the Bid #.

11. Click **POs > In Progress** from your Control Center to view the newly created purchase orders.

Click on the **Purchase Order #** blue hyperlink to open the desired Purchase order.

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name
00000076	00000009	TKD Inc

Purchase order creation options:

- ☒ Include Narrative Items
- ☒ Include Bid Attachments
- ☒ Include Bid Tab Attachments
- ☒ Include Bid Notes
- ☒ Include Quote Subcontractors
- ☒ Include Vendor Quote Attachments
- ☒ Include Forms

Click "Continue" button to create PO or click "Cancel & Exit" button to cancel the PO creation and return to the bid tabulation summary page.

Continue Cancel & Exit

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total
0000237	00000006	Wiki's Widgets	\$27,820.00
0000238	00000028	Office Essentials	\$32,649.00

OK

Home - Welcome Back Buyer Buyer

News(1) Dashboard Reqs(6) Bids(12) **POs(1)** Approval(0) My Reminders(0) Events(0)

In Progress(1) Ready for Approval(0) Ready to Send(0) Returned(0) Change Order(0)

Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total
PO-15-1080-03091-030EP-0000001464	Operational Services Division	08/25/2014	Test Test	OSD01/OSDEP	Buyer Buyer	Conversion Vendor	\$0.00

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12. The PO 'In Progress' opens to the General Tab; any and all edits can be made.

All information from the Bid was converted into the MBPO, however if edits need to be made click through each tab to make the appropriate changes.

- The Items tab will be the MBPO catalog, if a detailed and long item list is desired you will need to reach out to OSD and the Helpdesk for assistance.

On the **General Tab** make sure the following is correct:

Short description: a searchable field; your departmental numbering schema here

Release Type:

- Direct Release:** a single vendor blanket with specific pricing, select if you would like the order (PO) to be ready to send to the vendor once the requisition is approved
- Standard Release:** used for any blanket with or without pricing, select if you would like the order (PO) to require a second approval for the PO or you would like to request quotes from the vendor(s) on the MBPO

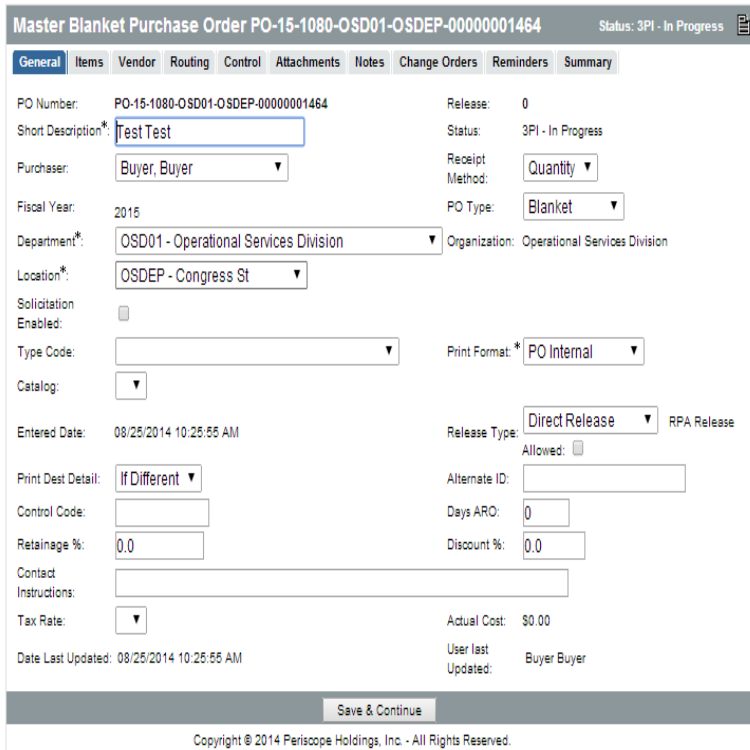
If the blanket will serve as a multi-vendor contract used for conducting Bids to get pricing for specific orders, be sure to select **Solicitation-Enabled** and instruct users to create **Solicitation Enabled release requisitions** when ordering from this contract.

- Multi-Vendor based blankets require "Standard Release"
- In some cases, departments may choose not to check off "Solicitation Enabled" on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing.

Type Code dropdown:

- SW**-statewide Contract
- NC**-Non-statewide Contract (most departmental contracts)

Next go to the **Control Tab**



Master Blanket Purchase Order PO-15-1080-OSD01-OSDEP-00000001464 Status: 3PI - In Progress

General Items Vendor Routing Control Attachments Notes Change Orders Reminders Summary

PO Number: PO-15-1080-OSD01-OSDEP-00000001464 Release: 0

Short Description*: Test Test Status: 3PI - In Progress

Purchaser: Buyer, Buyer Receipt Method: Quantity

Fiscal Year: 2015 PO Type: Blanket

Department*: OSD01 - Operational Services Division Organization: Operational Services Division

Location*: OSDEP - Congress St

Solicitation Enabled: ☐

Type Code: Print Format*: PO Internal

Catalog:

Entered Date: 08/25/2014 10:25:55 AM Release Type: Direct Release RPA Release

Print Dest Detail: If Different Allowed: ☐

Control Code: Alternate ID:

Retainage %: 0.0 Days ARO: 0

Contact Instructions: Discount %: 0.0

Tax Rate: Actual Cost: \$0.00

Date Last Updated: 08/25/2014 10:25:55 AM User last Updated: Buyer Buyer

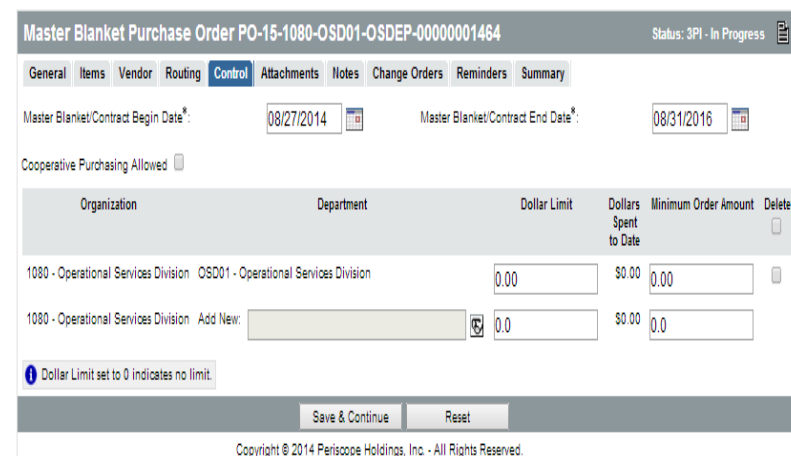
Save & Continue

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Screenshot



Directions

13. At the top of the page, select the contract Begin and End date using the calendar icon if not already done so on the Bid.

The Cooperative Purchasing Allowed box should only be checked if multiple COMMBUYS organizations have access to view and use this MBPO.

New contracts created in COMMBUYS are divided into two groups:

- **Statewide / Designated Statewide**, which will be available for use to all eligible entities
- **Limited User / Departmental Contracts**, which will be available for use by one (i.e. the issuing Department) or more eligible entities (either listed specifically in the RFR or defined generally in the RFR and then subject to authorization by the issuing Department)

Contract type

- **Statewide** – Only check Cooperative Purchasing and Add “All Org” if authorized by OSD or within the RFR language
- **Limited User Departmental Contract/Multiple Organizations** – Check Cooperative Purchasing and Add one or more Organizations authorized to use the MBPO
- **Limited User Departmental Contract/Single Organization** – Do not check Purchasing; this defaults to your organization only

14. If cooperative purchasing is checked click the eyeglass icon to select Organization (you can only select one organization at a time). Check the radio box and click **Select** at the bottom of the page.

Once selected the department will populate. Select the specific department.

If cooperative purchasing is left unchecked, select the department(s) within your organization who will need to view and utilize this MBPO.

Go to the **Summary** tab.

Select	Organization ID	Organization Name
<input type="radio"/>	ALL ORG	Organization Umbrella Master Control
<input type="radio"/>	1000	Developmental Disabilities Council
<input type="radio"/>	1001	Attorney General's Office
<input type="radio"/>	1002	Department of Agricultural Resources
<input type="radio"/>	1003	Executive of Administration and Finance
<input type="radio"/>	1004	Annelate Tax Board

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Master Blanket Purchase Order PO-15-1080-OSD01-OSDEP-00000001464 Status: SPI - In Progress

General Items Vendor Routing Control Attachments(1) Notes Change Orders Reminders Summary

Header Information

Purchase Order Number:	PO-15-1080-OSD01-OSDEP-00000001464	Release Number:	0	Short Description:	Test Test
Status:	SPI - In Progress	Purchaser:	Buyer Buyer	Receipt Method:	Quantity
Fiscal Year:	2015	PO Type:	Blanket	Minor Status:	
Organization:	Operational Services Division	Location:	OSDEP - Congress St	Type Code:	
Department:	OSD01 - Operational Services Division	Entered Date:	08/25/2014 10:25:55 AM	Control Code:	
Alternate ID:		Retainage %:	0.00%	Discount %:	0.00%
Days ARO:	0	Release Type:	Direct Release, RPA Release Not Allowed	Pcard Enabled:	No
Print Dest Detail:	If Different	Tax Rate:		Actual Cost:	\$0.00
Catalog ID:					
Contact Instructions:					
Invoice Method:	Three Way Match				
Print Format:	PO Internal				
Solicitation Enabled:	No				

Attachments

Agency Files:
Agency Forms:
Vendor Files:
Vendor Forms:

Primary Vendor Information & PO Terms

Vendor:	243555 - Conversion Vendor Conversion Conversion 1 Congress Street Boston, MA 02114 Email: test@goopenscope.com Phone: 9999999999 ic 179	Payment Terms:		Shipping Method:	
		Shipping Terms:		Freight Terms:	

Master Blanket/Contract Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Distributor Status
243555		Conversion Vendor	Paper Copy Mailed	Active

Master Blanket/Contract Controls

Master Blanket/Contract Begin Date: 08/27/2014 No Master Blanket/Contract End Date: 08/31/2016

Cooperative Purchasing Allowed:

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
1080 - Operational Services Division	OSD01 - Operational Services Division	\$0.00	\$0.00	\$0.00

Item Information

Print Sequence # 1.0, Item # 1: Test for goods and services SPI - In Progress

UNSPSC Code: 73-15-11
Furnishing construction services

Receipt Method	Qty	Unit Cost	UOM	Discount %	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
Quantity	1.0	\$0.00	EA - Each	0.00	\$0.00		\$0.00	\$0.00

Manufacturer: Brand: Model:
Make: Packaging:

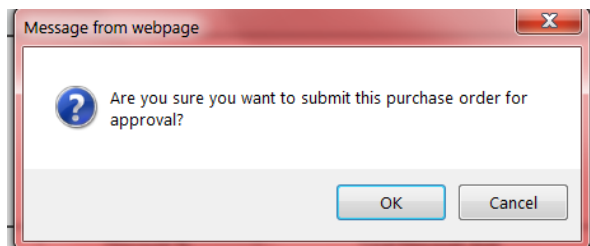
Submit for Approval Cancel PO Clone PO Print Print Vendor Copy

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Directions

15. The purchase order opens to the **Summary** tab and is currently in an 'In Progress' status.

Scroll to the bottom of the page and click the **Submit for Approval** button.



16. A popup message displays.

Click **OK** to submit the purchase order for approval.

17. Once the PO has been approved, it is ready to be sent to the vendor(s).

Go to **PO > Ready to Send** in your Control center to send to vendors.

Click the blue hyperlink **purchase order #** to open the PO.

News(1) Dashboard Reqs(27) Bids(50) **PO(8)** Approval(2) My Reminders(11) Events(1)
In Progress(6) Ready for Approval(0) **Ready to Send(1)** Returned(0) Change Order(1)

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Screenshot

Vendor Notification Actions

Option(s) ☒ Send Email and Notify Vendor ☐ Set to Printed Status

[Save & Continue](#)

[Cancel PO](#) [Clone PO](#) [Print](#)

Directions

18. The purchase order opens with a status of Ready to Send. Scroll to the bottom of the page.

Select one of the two options:

- **Send Email and Notify Vendor:** sends vendor's COMMBUYS contact an email about the PO and the PO can be found in COMMBUYS
- **Set to Printed Status:** no email is sent but the Vendor will be able to find and open the PO in COMMBUYS

Click the **Save & Continue** button to put the MBPO in a 'Sent' status.

Vendor Notification Result

Subject: Purchase Order Notification - office supplies


Email Recipients

Delivery Date: 01/29/2014 02:20:15 PM

Vendor ID	Vendor Name	
00000006	Wiki's Widgets	Alyssa Arnold (linda.banks-grant@accenture.com)

[OK](#)

19. Confirm the email recipients and click the **OK** button.

Status: 3PS - Sent 

20. The Purchase order reopens to the **Summary** page with a Sent status. This means the MBPO has been sent to the vendor and the items/services on it can be found and ordered using a release requisition.

To view the PO, go to the **Document Dropdown > PO > Sent**

Alternatively, use the **Advanced Search** function (the magnifying glass) select Contract/Blankets document type, then enter the COMMBUYS PO number in the PO number field, or use any of the other open fields.